

ENHANCED A&E CONSULTANT SELECTION PROCESS

JUNE 29, 2015

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Review of Why Original Process Is Changing

- **Audits, Legal, and DPAC Task Force** recommended revisions to our consultant selection process
- Continuous improvement minimizes Caltrans' exposure to Enterprise Risks such as protests and lawsuits
- Proposed process is more consistent with the **Government Code and Regulations**
- Incorporates complaints / concerns from **internal and external stakeholders** about the current process
- Incorporates feedback from the Pilots

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Initial Selection

- Requesting SOQ hard copies for all Panel members
- **Relevant projects** in Section F of the SF 330 will be **based on individuals** who are listed in the organization chart
- Five of the ten projects listed in the Section F will need a **verification memo and a reference check** from the client who received the services
- **SOQ** utilized in both Initial Evaluations and Final Evaluations and will be an Attachment to the Contract

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Initial Selection

- No SOQ Clarifying questions or Standard questions will be developed.
- Panel will Evaluate SOQ Independently by documenting Strengths & Weaknesses **with SOQ page/section references** in support of the SOQ Initial Evaluation Criteria.
- Panel consensus discussion will be based on **review and collective** documentation of **Strengths and Weaknesses** of each Firm

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Final Evaluation

- Interview questions are developed by a Questions Development Team: Contract Manager + 2 Subject Matter Technical Experts not on the Panel
- Questions are kept confidential and presented to the panel on the day of the interview for review and comprehension
- Short-listed firms will receive an **Example Task Order** with the Interview Letter to present the **approach, challenges, key staff's availability and ability to deliver the Example Task Order**

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Final Evaluation

- Firms will be provided **20 - 30 mins** to review **Technical Approach Interview Questions prior to Oral Presentations**, in a room monitored by a Proctor
- Presentation: Firms will have **10 mins** to demonstrate their knowledge of the SOW, the challenges associated with the Contract, and the Team's ability to respond to the contract needs
- Technical Evaluation Part A: Firm's **response to the Example Task Order's** approach, challenges, key staff's availability and ability to deliver

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Final Evaluation

- Technical Evaluation Part B1: Firms will have 25 to 35 mins to answer **Technical Approach Questions**
- Technical Evaluation Part B2: Firms will have **2 mins Closing Statement** to summarize **Technical Approach Questions**
- Initial Evaluation Score included as part of the Final Score

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Final Evaluation

- Panel will Evaluate Presentation & Interview Independently
- Panel will **Review and Collectively** document the **Strengths and Weaknesses** of each Firm
- Panel will Prepare the **Consensus Ranking** and **Certify**

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Overall Interview Schedule

Schedule	Time Allotted In Minutes
Consultant's scheduled arrival time and sign in:	10
Technical Questions Review Prior to Interview	20 - 30
Consultant's Presentation	10
Example Task Order Presentation	10 - 15
Technical Interview Questions by selection committee	25 - 35
Consultant closing statement on Technical Interview Questions	02
Caltrans closing statement	02
Consultant take down equipment and exit	02